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I. INTRODUCTION AND SUMMARY

Taken all in all 1964 was a rather good year for the Belgian fishing industry. The catches of the Belgian fleet (in Belgian and foreign ports) amounted to about 53 thousand metric tons valued at BF 703 million (1), a decrease of 3.6 percent as compared with 1963. The decrease results principally from the reduced sole catch (in 1963 the sole catch was exceptional) and smaller landings of groundfish from the Icelandic fishing grounds (in 1963 Belgium sold three of its larger vessels which used to operate in the Icelandic waters).

During the first half of the year, the sprat catch remained abundant (as it had been during the last months of 1963) which caused serious disturbances on the market and required government purchasing under the minimum price system. The herring season again was very poor (no intervention under the minimum price system was required since the small landings had no problem in obtaining the set minimum prices). The shrimp catch remained at a very low level.

For the modernization of the fleet 1964 has been a very good year since 29 newly built vessels were added to the fleet in part replacement of 37 older vessels.

Labor shortage remains the outstanding problem of the fishing industry; end 1964 only 340 vessels out of 388 were manned. Attempts to recruit unemployed workers or foreign labor failed and it is expected that only the granting of higher salaries and allowances will attract new labor. An improvement may come about in the future, since the Belgian government has in principle agreed to direct support to the fishing industry, in addition to the indirect subsidies offered under the minimum price system, the demolition premiums, etc. These direct subsidies, however, will probably not be granted before 1966.

Belgian imports of fish products increased 18 percent to 1966 thousand tons (including 69 thousand tons of fishmeal). Imports of fresh groundfish increased about 4,000 tons (as a result of the smaller landings of the Belgian fleet). Belgian exports of fish products remained on the same level as during 1963 (about 20 thousand tons).

(1) BF 50 : $ 1.

Statistics of the E.E.C. commission over the years 1959-1963 show that the fish consumption per capita in Belgium is somewhat higher than the E.E.C. average (about 11 kg. per year) and that about 54 percent of the total consumption consists of fresh fish, shellfish and mollusks. There is nevertheless no doubt that the consumption of deep freeze products is expanding. The main problem of the Belgian manufacturers of frozen fish products is the lack of supplies, in the required quantities and qualities, of the Belgian fleet. The expanding market for frozen fish may be a potential market for American exporters, if prices are competitive.

II. GOVERNMENT POLICY

a) The Budget

Up to now the Belgian fishing industry does not receive direct subsidies, but the Government budget (Ministry of Agriculture and Ministry of Communications) includes a number of indirect subsidies, such as premiums for new fishing equipment, premiums for apprentices, etc.

The total budget (for fisheries) of the Ministry of Agriculture for 1965 amounts to BF 4,762,000 (1) (not including the intervention of O.C.R.A. under the minimum price system), as compared with BF 5,112,000 in 1964. The subdivision of the budget is about the same as in 1964.

The total budget (for fisheries) of the Ministry of Communications for 1965 amounts to BF 21,071,000 as compared with BF 34,363,000 for 1964. Of this amount, about BF 16 million is granted for the schools for fishermen and the training vessel Cdt. FOURCAULT (in 1964 the budget provided for 28.5 million for this purpose). The budget provides only BF 1,000 for scrapping premiums for old vessels but in fact the amounts available are much higher since the credits not used up in previous years are automatically forwarded to the next year. The amount available in 1965 thus is BF 9,165,428. In 1964 the demolition premiums granted amounted to BF 3,171,877.

(1) $ 1 = 50 BF.

Taking into account the subsidies to the minimum price fund (about BF 4 million in 1964) the total Government expenditures for the fishing industry amounted to some BF 45.5 million in 1964. For 1965 the total amount may be somewhat less, but it will probably be increased by direct subsidies (see below).

b) Government agrees in principle with direct subsidies

A study of the profitability of the Belgian fishing fleet during the years 1956-1961(1) based on the accounts submitted by the shipowners to the Ministry of Agriculture, showed that during the 5 year period under review, only 25 percent of the Belgian fleet accrued any profits to the shipowners. About 45 percent of the vessels were able to cover total expenses and almost 28 percent of the vessels suffered losses.

While the profitability improved since 1961, it may be estimated that even in 1963 (which was considered a very good year) only 25 percent of the Belgian vessels accrued any real profits.

As the exceptional sole catch of 1963 did not reoccur in 1964 the total gross income of the fleet decreased to BF 599.6 million (compared with BF 655.8 million in 1963) which means that the average income both of the shipowner and of the fishermen (paid in percentage of the total revenue) decreased by about 8.5 percent.

On the demand of the "Rederscentrale" (shipowner's organization) the Government, on the basis of the above figures, agreed that direct subsidies to the shipowners were required. In principle the Government agreed with subsidies amounting to BF 24 million (to be granted to the shipowners according to the quantity of the catches) but detailed information as to the way in which the subsidies are to be calculated and distributed are not available yet.

c) Agreement with the Netherlands on Landings and on Fishing in the Territorial Waters.

The Belgian and Dutch Governments, under the Benelux Treaty reached an agreement on the problems of non-discrimination and territorial waters. The agreement provides that, at the latest by November 1, 1965, the vessels of both countries will be allowed to operate in the territorial waters of the partner country under the same conditions as the vessels of the national fleet. At the same time, Dutch vessels will be allowed to land their catch in Belgian ports and vice-versa.

Up to now, landings of foreign vessels in the Belgian ports werenot authorized.

Comments of the Belgian fishermen on the subject agreement are contradictory. It appears that it will not be profitable for Dutch vessels to land their catch of groundfish in Belgian ports. Eventual landings of herrings by Dutch vessels in the Belgian ports are not at issue since landings by Belgian vessels are insufficient to meet demands (as a result of the small catch on the traditional fishing ground of the "Witte Bank" (Central East part of the North Sea).

Landings of sprat by Dutch vessels may, however, cause heavy disturbances on the market to the detriment of the Belgian shrimpers and coasters (vessels of Class I and II, see enclosure 1.) These small vessels, however, would find a compensation in the access to the Dutch territorial waters for shrimp fishing.

In general, the Belgian fishermen favor the Belgian Dutch Treaty, though many questions, for example in connection with the minimum price system, are not yet settled.

III. THE FISHING FLEET

During 1964, 29 vessels were added to the Belgian fleet : 14 small medium trawlers (class III), 19 big medium trawlers (clas IV), 3 small deepsea trawlers (class V) and 2 deepsea trawlers (class VI).

All these vessels were newly built, 19 by Belgian yards and 10 by foreign yards.

The past year thus was exceptionally good with regard to the modernization of the fleet. From 1959 to 1963 the number of newly built vessels added to the fleet amounted to an average of 10 per year (50 in total) as compared with the 29 vessels (totalling 2,354 T. gross tonnage and with the combined H.P. of 8,890 HP).

It is expected that the number of new vessels added to the fleet will decrease in 1965 since the Government anti-inflation policy included restrictions on the granting of credits at reduced rates for the construction of new vessels and a slow-down in the granting of demolition premiums. On December 31, 1964 the number of vessels under construction amounted to 13 as compared with 24 on December 31, 1963.

During 1964, nine vessels were lost in shipwrecks and 28 vessels left the fleet (including the last steamship which was still in use. Of these 37 vessels, 23 belonged to class I or II (shrimpers and coasters). 13 other vessels were rebuilt or equipped with new motors and thus moved to other classes.

As a result of these changes the Belgian fishing fleet consisted on December 31, 1964 of 388 vessels as compared with 396 vessels end 1963. Per port, the number of vessels was as follows:

Ostend : 167, including 40 out of the 44 vessels of Class V and VI
Zeebrugge : 161, of which 101 vessels of class III
Blankenberge : 2, class III
Nieuwpoort : 58, all of class I, II and III.

IV. CAPITAL INVESTED

The modernization of the fleet is also reflected in the evolution of the invested value. From 1960 to 1964 the number of vessels decreased but the invested value continued to increase. The value of

the investments in the fishing fleet is based on the insurance value of the vessels, plus estimated value of equipment.

Year	Number of Vessels	Capital Invested (million BF)
1960	419	1124
1961	416	1170
1962	398	1247
1963	396	1213
1964	388	1295

V. LABOR

The labor shortage remains one of the most important problems of the fishing industry. End 1964, 340 vessels out of the total of 388 were manned, as compared with 348 vessels end 1963.

The total number of fishermen employed decreased to 1461 (32 less than in 1963) and the number of apprentices decreased from 56 in 1963 to 46. The total number of youths under 18 employed on Belgian fishing vessels amounted to only 113, which is insufficient for the replacement of older fishermen (on December 31, 1964, 126 fishermen were older than 55).

The total number of 1461 includes 122 skippers who own the vessel on which they serve. The dock personnel included 1175 members and the engine room crew 286 members

VI. LANDINGS

a) in Belgian Ports

During 1964 the Belgian fishing fleet landed some 47,665 metric tons of fish, shellfish and mollusks in Belgian ports. Compared with 1963 this is a decrease of about 8 percent This decrease is due to much smaller catches of ground fish (about 38,000 tons in 1964 as compared with 46,000 tons in 1963), principally of sole (it must be taken into account that the sole catch in 1963 was exceptional).

Landings of pelagic fish increased considerably in terms of weight (from 3.9 thousand tons in 1963 to 7.8 thousand tons in 1964) as a result of the abundant sprat catch, but since the average prices of sprat dropped from BF 3.39 per kg. to BF 1.96 per kg. the total value of the sprat catch was smaller in 1964 than in the previous year. The herring season again was very poor, both in terms of quantity and quality of the catch. Landings amounted to 1,607 tons as compared with 1,836 tons in 1963 and the average price per kg. decreased from BF 4.74 to BF 4.61. It must be taken into account that 1963 also was a very bad herring year (in 1962 the average price of herring still was BF 8.68 per kg.).

As for shellfish and mollusks, the total catch amounted to 1,911 tons, a slight increase over 1963, but the average prices decreased with the result that the total value of the landings decreased from BF 47 million in 1963 to BF 44 million in 1964.

b) In Foreign Ports

Landings of the Belgian fishing fleet in foreign ports (principally British and Scandinavian ports) were much higher than usual. The total weight of these landings amounted to 5.8 thousand tons (3.8 thousand tons in 1963) and the value rose from BF 58.8 million in 1963 to BF 78.2 million in 1964. The landings in foreign ports consisted in 99 percent groundfish, principally cod (1.2 thousand tons) and haddock (1.6 thousand tons).

The total value of the landings of the Belgian fleet (Belgian plus foreign ports) thus amounted to BF 678 million as compared with BF 703 million in 1963, a decrease of 3.6 percent. Nevertheless 1964 is considered a satisfactory year for the Belgian fisheries.

VII FISHING GROUNDS

Icelandic waters remain by far the most important fishing grounds of the Belgian fleet (Icelandic fish accounts for about 22 percent of the total value of landings in Belgium). There has been, however, an important decrease in the catch on these grounds (about 13,000 metric tons (1) as compared with 18,000 tons in 1963). The catch

(1) one metric tons equals 2204.6 lbs.

in the Southern area of the North Sea also decreased considerably (5,500 tons as compared with 12,600 tons in 1963). The shrimpers and coasters which are operating in the coastal area obtained good results owing to the abundance of sprat (in terms of value the results of the sprat catch could, of course, not compensate for the losses resulting from the sharp drop in the catch of soles), but the sprat catch enabled owners of small vessels of class I to survive). Total landings from the coastal area increased about 3,000 tons.

Landings in Belgian Ports, as per Fishing Ground, 1964
Quantities in metric tons; value in million BF.

Fishing Ground	Weight	Value
Coastal Area	10,860	77.6
North Sea		
South	5,516	72.4
Central West	4,714	58.8
Central East	1,803	22.9
North	1,728	17.5
Morray Firth	428	5.3
Fladen	46	0.4
Channel	662	8.8
Bristol Channel	3,103	64.1
Ireland (Mine Head)	3,091	49.8
West Scotland	183	1.9
Iceland	12,714	137.2
Irish Sea	2,812	82.5
Total	47,665	599.7

(Source : Nationaal Instituut voor de Statistiek).

VIII. THE MINIMUM PRICE SYSTEM

The minimum price system, established in 1959, again proved to be a very effective aid to the fishing industry. During 1964, about 7,140 tons of fish were purchased by the "Rederscentrale" because the bids obtained in public auction felt below the minimum support prices. The system includes three sections : groundfish, herring and sprat.

a) Groundfish

During 1964 (calendar year) 2,793 tons of groundfish (that is 7.10 percent of total landings in the Belgian ports) were purchased under the minimum price system at BF 12 million. Compared with 1963 this is a decrease of 570 tons and BF 3.8 million. The most important species purchased were cod (145 tons) Haddock (705 tons) whiting (151 tons) flatfish (444 tons) and ray (137 tons).

The fish was sold to fishmeal manufacturers (531 t.) salting and drying plants (368 t.) feedstuffs manufacturers (1,636 t.) canning and deepfreezing plants (227 t.) and exported outside E.E.C. (31 t.) for a total price of BF 6.1 million.

The intervention by the minimum price fund thus amounted to BF 5.9 million (as compared to BF 10.3 million in 1963) financed by "Rederscentrale", which is the shipowners organization, and O.C.R.A. (Ministry of Agriculture) both paying 50 percent of the total intervention.

b) Herring

For herring the minimum price system operates per season, that is from September till February. Both the herring seasons of 1963-64 and 1964-65 were very poor. Landings were very small so that the fund did not have to intervene during the calender year 1964 to keep prices up.

c) Sprat

For the sprat the fund operates during the season from October 4 till March 15. The abundant catch of sprat, both during the last months of the 1963-64 season as during the first months of the 1964-65 season caused large disturbances in the minimum price system since the fund was not able to finance the difference between purchase and sales value. Therefore, the minimum price of sprat was reduced several times, contributions of the shipowners were raised, small vessels (under 150 HP) were excluded, sprat catch was forbidden on certain days, etc.

The sprat catch decreased during the last months of the 1964-65 season so that the normal regulations could be restored (January-March 1965).

The quantities purchased under the minimum price system were : season 1963-64 : 2,671 tons
season 1964-65 : 445 tons

The total intervention for both seasons amounted to BF 3,9 million of which 2.7 million financed by Government subsidies and 1.2 million by contributions of the shipowners.

d) Total

For the entire calendar year 1964, the combined systems for groundfish, herring and sprat required an intervention of the minimum price fund of BF 7.9 million (as compared with BF 12.2 million in 1963).

IX IMPORTS

During 1964 Belgium imported 165.7 thousand tons of fish products (including 68.9 thousand tons of fishmeal) valued at BF 2,443 million. Compared with 1963 this is an increase of 18 percent in terms of weight and of 20 percent in terms of value. This increase compensated for the smaller landings by the Belgian fleet.

Fresh fish accounted for about 30 thousand tons (18 thousand tons of groundfish, 19 thousand tons of herring and 1.6 thousand tons of mackerel). Salted, dried, and smoked fish accounted for 12 thousand tons (of which about 8 thousand tons were salted and smoked herring). Imports of shellfish and mollusks amounted to 29 thousand tons (of which 24.6 thousand tons of mussels and 3 thousand tons of shrimps).

Imports of canned products amounted to 22 thousand tons including :

sardines	3,882 tons
pilchards	3,076 tons
salmon	4,065 tons
shellfish	2,099 tons
herring	989 tons
other	7,720 tons

Disregarding the fishmeal (supplied principally by Peru, Chili, and Norway), fresh water fish (supplied principally by Denmark) and Caviar and substitutes, the Belgian imports amounted to 93,506 T. valued at BF 1,793 million. Of this total Common Market partners supplied 68 percent, EFTA countries 12 percent and other countries about 19 percent. The most important supplier was, as usual, the Netherlands, with 54,811 T. (including 15,000 T. of fresh fish and 28,000 T. of shellfish and mollusks). France supplied 4,031 T. (of which 3,263 T. fresh fish) and West Germany 6,521 T. (4,129 T. of fresh fish and 1,555 T. of preserved fish).

Belgian imports from the US amounted to 505 T. valued at BF 29,626 including :

	weight (T)	Value (1,000 BF)
preserved fish	32	3,415
shellfish and mollusks	38	4,059
canned products	258	14,789
fresh water fish	87	6,690
fishmeal	89	54

These imports as far as can be observed, are predominantly fish specialties of the delicatessen type.

X. EXPORTS

Belgian exports of fish products amounted to about 20,000 tons valued at BF 436.8 million. As usual the most important customers were the EEC partners (about 69 percent of total) and Congo. See enclosure 9. Belgian exports consist principally of fresh ground fish (8,500 tons) dried and salted fish (4,000 tons) and fresh herring and sprat.

Exports to the United States amounted to only 12 tons valued at BF 396,000 and included 10 tons of fresh and frozen fish and two tons of canned fish products.

XI CONSUMPTION

Since there are no consumption statistics available in Belgium, it is difficult to estimate the consumption of fish products. Estimations on the basis of landings plus imports minus exports showed a consumption of about 121,000 tons in 1963 (calculations of the Dienst voor de Zeevisserij Ministery of Agriculture). For 1964 the apparent consumption amounted to 155,000 tons.

A study published in April 1965 by the Division for Agricultural Information in collaboration with the Directorate General for Agriculture of the E.E.C. Commission, supplies additional information.

Figures of both sources, however, cannot be directly compared since different methods of calculation were used. The figures of the E.E.C. Commission are based on "availabilities", i.e. total landings by the national fleet (disregarding the fact that part of the landings are landed in foreign ports) plus imports. Exports are regarded as a subdivision of consumption.

According to the study of the E.E.C. commission the consumption of fish products in Belgium and the E.E.C. was as follows:

Consumption per Head of Population in kilograms of Nominal Catch, e.g. live weight of landings or equivalent.

Year (1)	Belgium	E.E.C.
1959-60	11.6	10.8
1960-61	11.2	10.8
1961-62	11.3	10.9
1962-63	10.0	11.3

(1) August 1 through July 31.

The degree of self-sufficiency (production as percentage of available supplies) was as follows:

Year	Degree of Self-Suffciency Belgium	E.E.C.
1959-60	56	86
1960-61	57	84
1961-62	53	83
1962-63	58	78

These statistics thus show that Belgian consumption per capita is generally higher than average consumption in the E.E.C. and that Belgium has a very small degree of self-sufficiency as compared with the other E.E.C. countries.

Belgian consumers prefer fresh products as shown in the table below :

Breakdown of Fish Consumption in Belgium
in Percentage of total Consumption

	Herring etc.	Roundfish	Flatfish	All Species
consumed fresh	25.7	62.5	44.6	53.9
consumed processed	56.5	19.11	23.4	24.9
used as animal feed	-	1.5	1.0	1.3
exported	17.8	16.9	31.0	19.9

In fact thus only one quarter of total landings plus imports is processed for human consumption and of course a large part of these quantities is lost during the processing (e.g. converted into fishmeal and fish oil).

Industrial processing of fish by form, Belgium
(in percentage of total processed)

	Herring	Round Fish	Flatfish	All Species
salted	22.8	5.6	-	8.1
dried	-	15.6	43.	15.3
smoked	47.4	14.4	13.0	28.4
canned/preserved	21.0	2.2	-	6.3
deep frozen	-	-	-	-
fish oil or meal	8.8	62.2	43.5	41.9

The E.E.C. statistics do not list any deepfreezing in Belgium. This is misleading since there are three deepfreezing plants in Belgium.
Since there are no production figures available the production is not listed as such. The fish used by the deepfreezing plants thus is included in the consumption of "fresh" fish.

XII FISH MEAL

The data for the Belgian fishmeal production during 1964 have not been published yet. For the sixth month period January-June 1964, the production amounted to 2,250 metric tons, the same quantity as during the corresponding period of 1963. The yearly production thus probably will be about the same as in 1963 (4,500 metric tons).

Belgian imports of fishmeal increased from 51 thousand tons in 1963, to 60 thousand tons in 1964. Exports decreased slightly.

On the basis of estimated production plus imports minus exports, the Belgian consumption of fishmeal amounted to about 70,500 tons, an increase of about 29 percent over 1963. Belgian production only represents 6.4 percent of domestic consumption.

Fish Meal : Import-Export

	1963		1964	
	metric tons	BF 1,000	metic tons	BF 1,000
imports	51,363	330,133	68,982	464,913
exports	3,084	20,072	2,938	19,269
difference	48,279	310,061	66,044	445,644

The most important suppliers were Peru (33,196 T) Chili (10,187 T) Norway(9,074 T) and the Netherlands (234 t.)

Exports went almost entirely to Western Germany (2,609 T).

XIII. FISH OIL

During 1964 Belgium imported some 22,807 tons of fish oil, including 9,813 tons of whale oil. The main suppliers were Peru, the U.S. and the Netherlands. The total value of these imports amounted to BF 235 million as compared with 196 million in 1963.

Belgium exported small quantities of fishoil (952 tons) to the Netherlands and Western Germany.

The Belgian fishoil production estimated at some 600 tons per year, thus represents only about 2.5 percent of the domestic consumption.

XIV. DEEPFROZEN FISH PRODUCTS: POTENTIAL MARKET FOR U.S. PRODUCTS

Little information is available about frozen fish products in Belgium. The "Nationaal Instituut voor de Statistiek" (National Institute for Statistics, Ministry of Economics) started gathering information for a study of this industry in 1963, but up to now no information has been published. It is therefore, impossible to estimate production and consumption of frozen fish in Belgium. There is, however, no doubt that the consumption of frozen fish increased rapidly during the past years.

There are three freezing plants in Belgium; all belonging to entities which also comprise ice-plants, fishmeal and fishoil plants and/also/operators. The largest one , Les Frigorifères du Littoral, at Ostend, is since two years controlled by the British group "Viking". It sells its products under the trade name "Crops" and "Viking" but also does the freezing for other companies using their own trade mark such as "IGLOO". Its own products are supplied directly to retailers (reportedly about 60,000).

The second company, using the trade mark "Iceberg" is a joint venture of "Froid Industriel" at Ostend and "Artic", a leading Belgian manufacturer of icecream. The production is sold through the distribution channels of Artic which supplies about 15,000 retailers.

It is noteworthy that the retailers, which used to refuse to make the investments for refrigerating and deep-freeze equipment and insisted this equipment be loaned by suppliers in recent years, have begun leasing or buying their own equipment. This is one of the indications that the market for frozen products is expanding considerably.

Both companies buy part of the fish at the Ostend fish auction hall, although the larger part of their fish sourcing is from abroad (frozen fish blocks from Germany, Poland and other countries).

The third company, Seafood, at Zeebrugge, principally processes the catch of the Belgian hektrawler "Narwall" (which belongs to the same group) and works mainly for the export market. Only a small part of the production is sold in Belgium under the trade mark "Appetit".

All companies report that the market for frozen fish has expanded rapidly during past years and will continue to do so. The main problem of the Belgian freezers is not a sales problem, but a production problem, since landings in the Belgian ports are insufficient to supply the industry (taken into consideration the required size and quality of the fish).

The frozen fish products sold in Belgium are principally : cod fillets, plaice fillets, haddock, fillets, soles, crabs and peeled shrimps.

Since the Belgian manufacturers expect problems in meeting growing demands, increasing consumption of frozen fish may create a potential market for American products, if prices are competitive.

Belgian Fishing Fleet, December 31, 1964

Class	Number 1963	Number 1964	diff.	Horse Power	Tonnage
I	75	57	-18	3,475	962
II	64	57	- 7	5,309	1,512
III	150	153	+ 3	24,055	8,176
IV	70	77	+ 7	21,064	7,488
V	20	24	+ 4	9,865	3,638
VI	17	20	+ 3	18,240	7,504
Total	396	388	-8	82,008	29,280

		HP	Tonnage
I	Shrimpers	15-79	5-28
II	Coast trawlers	80-119	19-57
III	Small medium trawlers	120-239	33-115
IV	Big medium trawlers	240-349	73-185
V	Small deepsea trawlers	350-499	118-220
VI	Deepsea trawlers	500-2330	168-1399

Note : Class VI : 1963 16 motor vessels and 1 steamvessel
1964 motor vessels only.

Crews per Class of Vessel and per Function 1964

Class	Ships Manned	Crew Deck	Machine	Total	Average p.Vessel
I	47	108	18	126	2.68
II	49	120	26	146	2.98
III	145	463	122	585	4.03
IV	68	277	68	345	5.07
V	16	84	17	101	6.31
VI	15	123	35	158	10.53
Total	340	1,175	286	1,461	4.29

The deck personnel included:

skippers	340 (of which 122 are owners of the vessel)
first mates	95
crew masters	5
seamen 1st grade	615
seamen 2nd grade	63
apprentices	46
cooks	6
radio operators	5

Besides the 46 apprentices, 16 seamen first grade and 51 seamen second grade are less than 18 years old, and thus are classified as apprentices for the purpose of the premium system.

Total Weight and Value of Fish Landed in Belgian Ports BY Belgian Fishing Boats

	Landings 1963			Landings 1964		
	Weight Tons	Value 1000 BF	Average BF p/Kilo	Weight Tons	Value 1000 BF	Average BF p/kilo
Ground fish	45,831	592,656	12.93	37,913	535,505	14.12
Pelagic fish	3,935	15,899	4.03	7,840	19,995	2.55
Shellfish & mollusks	1,886	47,284	25.07	1,911	44,251	23.15
total	51,653	655,841	12.69	47,665	599,752	12.58

Source : Nationaal Instituut voor de Statistiek.

Landings of Most Important Species (Metric Tons) in Belgian Ports

Species	Landings 1963	Landings 1964
Haddock	2,652	3,376
Cod	8,736	7,559
Whiting	4,020	3,382
Plaice	5,088	3,859
Sole	7,572	2,407
Turbot	600	368
Ray	3,576	2,412
Herring	1,836	1,607
Sprat	1,896	6,073
Shrimps	912	901
Norway lobster (langoustine)	-	786
Total	36,888	32,730

Source: Nationaal Instituut voor de Statistiek

Average Price of Fish landed in Belgian Ports (Wholesale Price in BF per kilo)

	1963	1964
Haddock	9.04	7.10
Cod	9.71	10.86
Whiting	5.89	6.70
Plaice	7.11	8.33
Sole	31.93	73.24
Turbot	33.06	44.20
Ray	9.57	10.81
Herring	4.74	4.61
Sprat	3.39	1.96
Shrimps	29.85	25.31

Source : Nationaal Instituut voor de Statistiek

Belgian Imports of Fish Products, as per Commodities 1964

	Tons	Million BF.
Fresh Fish		
fresh water fish	3,250	173.5
herring	9,885	63.5
sprat	210	1.2
mackerel	1,670	11.3
ground fish	18,633	395.9
	33,648	645.5
Salted,Dried,Smoked Fish		
salted herring	7,881	85.1
smoked herring	472	7.2
sprat	6	0.1
mackerel	3	0.1
other	3,649	65.3
	12,001	158.0
Shellfish and Mollusks		
shrimps (not peeled)	1,556	40.4
shrimps (peeled)	1,429	139.9
mussels	24,638	78.3
other	1,644	140.1
	29,267	398.7
Canned Fish	19,732	623.7
Canned Shellfish & Mollusks	2,099	141.1
Fishmeal	68,982	464.9
Total general	165,739	2,432.0

Source: Bedrijfsraad voor de Zeevisserij

Imports of Fish Products as per Country of Origin 1964

Country	Weight metric tons	Value million B.F.
The Netherlands	54,811	711.0
France	4,031	56.6
West Germany	6,521	140.0
Italy	319	3.8
Total E.E.C.	62,682	911.5
United Kingdom	1,590	80.2
Norway	11,727	152.8
Sweden	128	3.6
Denmark	6,479	160.8
Switzerland	9	0.8
Austria	6	0.4
Portugal	4,993	140.4
Total EFTA	24,932	539.2
Iceland	3,077	27.2
Ireland	8	1.2
Finland	40	2.6
Spain	1,380	31.1
Yugoslavia	1,859	55.7
USSR	357	37.2
East Germany	1	0.9
Poland	1,167	12.2
Morroco	1,224	28.3
Egypt	56	3.2
South Africa	5,816	74.6
USA	505	29.6
Canada	2,656	134.1
Cuba	10	1.3
Peru	33,573	222.5
Chili	18,191	123.7
Iran	4	1.8
Pakistan	438	2.5
China	18	1.8
Japan	4,453	186.0
Hong Kong	55	2.0
Australia	35	2.7
Other	157	0.2
total other	75,172	992.3
total general	165,786	2,443.1

Belgian Exports of Fish as Per Commodities 1964

	Metric Tons	Million BF
Fresh Fish		
fresh water fish	286	18.6
herring	1,207	9.3
sprat	1,781	6.3
mackerel	294	2.2
ground fish	8,508	250.4
	12,076	287.0
Salted, dried, smoked fish		
salted herring	34	0.4
smoked herring	68	2.2
sprat	111	3.0
mackerel	4	0.1
other	4,116	89.9
	4,333	95.7
Shellfish & Mollusks		
shrimps (not peeled)	53	1.9
shrimps (peeled)	12	1.1
mussels	27	0.2
other	68	8.2
	160	11.6
Canned Fish	227	10.1
Canned Shellfish and Mollusks	115	12.3
Fishmeal	2,938	19.2
total general :	19,899	435.1

Source: Bedrijfsraad voor de Zeevisserij

Exports of Fish Products as per Country of Destination

Country	Weight Metric tons	Value million BF
France	6,246	199
Netherlands	1,726	43
West Germany	5,620	59
Italy	52	6
Total EEC	13,644	301
United Kingdom	697	31
Denmark	356	4
Switzerland	39	5
Other EFTA countries	123	1
Total EFTA	1,176	42
Spain	262	3
Greece	201	2
Poland	670	4
Kongo (Brazzaville)	309	5
Kongo(Leopoldville)	3,151	66
Dominican Republic	242	6
Indonesia	110	2
U.S.	12	-
Other countries	63	1
Total	5,079	92
Total General	19,899	436

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Is there a Future for the Belgian Fisheries ?

The Belgian sea-fishery is a small sector of industry the gross added value of which at factor costs was only 0.7‰ of the gross national product in 1963. The sector however has a greater significance at local level more particularly for the coast centres of Ostend, Zeebrugge and Nieuport.

The Belgian fisheries have to face intricate problems of a structural, biological and economic character. These difficulties are to a major extent typical of the West European fisheries as a whole. The problems involved will be analysed here in broad lines.

The Fishing-fleet : Structure and Trend.

Towards the end of 1964, the Belgian fishing fleet had 388 ships which accounted for an overall motor power of 82,008 h.p. and a tonnage of 29,280 gross registered tons (see Table 1).

It comprises 57 shrimpers, 57 coastal trawlers, 153 small midwater ships, 77 large midwater trawlers, 24 small deep sea trawlers and 20 deep sea trawlers.

Ostend is the main fishing port; it accounts for the highest number of ships while the deep sea trawlers mainly operate from its port.

The operating radius of the fishing fleet extends from the coastal area (shrimpers and coastal trawlers) to Iceland and the White Sea (deep-sea trawlers). It follows that the landings present a wide variety of types of fish.

The form in which the fleet is operated is mainly of the handicraft type. Most ship-owning firms are family businesses which have only one or two vessels. There are also six « sociétés anonymes » which mainly run deep sea trawlers and ten « sociétés de personnes à responsabilité limitée » which are almost exclusively owners of midwater ships.

Trend.

The number of ships fell from 479 in 1946 to 388 in 1964 whereas the new units are built to a larger size and are fitted with more powerful engines. The latter phenomenon coincides with the exhaustion of the traditional fishing grounds, whereby Belgian fishers were forced to prospect more distant areas.

The reduction in the number of ships is no doubt the result of the small earning capacity of the fisheries in the postwar years. The setback was most marked in the category of the shrimpers, while the steamers (Iceland trawlers) have disappeared completely.

TABLE I

COMPOSITION OF THE FLEET

Classes	Description	Power (h.p.)	Average tonnage (GRT)	Prospected fishing grounds	Number of units on Dec. 31, 1946	Dec. 31, 1958	Dec. 31, 1964
I	Shrimpers	— 80	15-18	15 miles off the coast	250	127	57
II	Coastal trawlers	80-120	25-28	25 miles to 30 miles off the coast	72	71	57
III	Small midwater trawlers	120-240	20-55	Southern and central area of the North Sea, the English Channel and the Bristol Channel	108	144	153
IV	Large midwater trawlers	240-350	95-100	Southern, central and northern part of the North Sea, the English Channel and the Bristol Channel and the areas to the south and south east of Ireland	35	68	77
V	Small deep-sea trawlers	350-500	150-155	Same fishing grounds as for Class IV and the Iceland Sea	1	17	24
VI	Large deep-sea trawlers	+ 500	370-380	Same fishing grounds as for Class V and the White Sea	13	14	20
	of which : motor trawlers				(—)	(8)	(20)
	steam trawlers				(13)	(6)	(—)
Total					479	441	388

(Source : Administration de la Marine et de la Navigation intérieure)

The number of coastal trawlers too fell off. The number of midwater trawlers and deep-sea (motor) trawlers however increased mainly as a result of the better earning capacity of their fishing-grounds.

Another tendency is the obsolescence of the fleet. The running of these old ships often involves high maintenance charges whereas for various reasons relatively new ships have become economically obsolete and are no longer remunerative.

In order to remedy this state of affairs a ship-breaking allowance of FB5,000 per gross registered ton withdrawn from navigation was granted in 1961 by the Government subject to certain conditions.

The Government also grants loans under State guarantee in the amount of 70% and upwards of the expenses incurred for the purchase of a newly built ship or the replacement of the engine whereas interest allowances are also granted.

This aid by the Government together with the improvement in the earning capacity of fisheries in the past few years, have encouraged an active building programme, which at present appears to be directed to new types of vessels such as small stern trawlers, which are adapted to various types of fishery. Foreign countries (for example Germany, Great Britain, the Netherlands) are now also specialising in new types, mainly up-to-date large tonnage ships which fish in distant areas and freeze their catches. These ships are chiefly being built for the account of large-scale or integrated enterprises.

It is hardly probable that (vertical) integration and the building of large-scale deep freeze trawlers will find ample application in our country. The relatively small volume of our market and our exports, the financing problems, the compulsory Dutch auction system on the municipal fish markets and the lack of strongly organised processing enterprises, counteract this trend.

There is also the question as to whether the additional construction costs of these modern ships will be covered by a higher yield, taking into account the exhaustion of the grounds utilised by our fishers.

The Manpower Problem.

In the postwar period the number of fishers has declined uninterruptedly. Although in the same lapse of time the number of ships also decreased there is nevertheless a permanent crew shortage. By the end of 1964, there were still 1,479 fishers (2,110 in 1947) for 342 ships (407 in 1947). At

Ostend there is at present an average shortage of 50 fishers. The result is that often ships have insufficient crew and are thus unable to sail.

In the past few years foreign fishers, more particularly Spaniards, have been recruited for deep sea trawling. This was however not sufficient. Measures were taken by the authorities, more particularly the granting of premiums for the engagement of shipmates and of allowances for investigation of the rationalisation of the work on board ship. In addition a favourable and anticipated pension scheme is being worked out.

Structure of Landings.

The landings of fishery products in Belgian ports amounted to 48 million kg in 1964 with an overall yield of FB 600 million. About 80% of the quantities supplied consisted of bottom fish, mainly cod, plaice, ray, whiting, haddock and sole; 16% was accounted for by pelagic varieties (mainly sprats), whereas crustaceans and molluscs (chiefly shrimps and Norwegian lobsters) represented 4%.

Mention must also be made of the Belgian landings abroad, especially Great Britain, which in 1964 were 5.8 million kg yielding FB 78 million.

The trend of the supply since the second world war is far from encouraging. Initially there was a considerable production, reaching a peak in 1947 at 75 million kg or FB549 million. These favourable catches were the result of the considerable quantities of herring (50% of the overall supply); the fish stock had had the opportunity to extend during the war years.

In 1956, the supply began to shrink appreciably mainly through the fall in the herring catches which in 1964 only amounted to 3.3% of the total.

TABLE II

SUPPLY OF FISHERIES PRODUCTS IN THE BELGIAN PORTS, 1947-1964

Categories	in '000 tons			in million FB		
	1947	1960	1964	1947	1960	1964
Bottom fish	40.0	41.5	38.0	409	479	536
Pelagic fish	33.3	4.6	7.8	100	19	20
Crustaceans and molluscs	2.1	1.6	1.9	40	38	44
Total	75.4	47.7	47.7	549	536	600

(Source: Service de la Pêche, Ministère de l'Agriculture)

The Overfishing Problem.

The decline in the quantities caught is mainly ascribable to the exhaustion of the fishing grounds through overfishing. The North Sea and the areas around Ireland and Iceland have indeed been intensively explored by almost the entire West European fishing fleet.

All sorts of international regulations governing the shape of the nets, the minimum space of the meshes and the minimum sizes of the various types of fish could not succeed in stopping the depletion of the fish stocks. The fishers accordingly prospected new and in most cases more distant fishing grounds such as the Barents Sea.

A few countries the coast of which abounds in fish have extended their fishing limits from 3 to 12 miles off the shore. Iceland opened the series in 1958, soon followed by the Faroe Islands (1959), Norway (1961), Greenland (1963) and Great Britain (1964). The Irish Republic and Denmark will be following suit.

The object of these measures is the protection of the fish stocks in the coastal areas concerned on the one hand and the granting of a preference status to the domestic fleet on the other.

Recently, it was suggested by the Norwegian authorities that the catches of each country should be subjected to a quota system on the basis of the average supplies over the past few years.

The Price Problem.

Besides the problem of overfishing which mainly influences the cost, the Belgian fisheries have also to face the price problem. The fish prices established at the compulsory auction not only lag behind the production cost and the prices for other foodstuffs, but are moreover subject to heavy day-to-day

fluctuations on account of the uncertain landings. The trade is in search of various solutions. First, there is a trend towards strengthening demand by means of publicity. The advertising campaign however yielded few results through lack of funds.

Accordingly, it has been possible to obtain from the authorities, as is the case in other neighbouring countries, that in future landing premiums would be granted. These bonuses (about FB24 million annually) would be paid in the form of a fixed subsidy per trip on a retroactive basis from January 1, 1965 until a common EEC fishery policy would bring a solution.

In order to even out the day-to-day fluctuations, a minimum price system was worked out in 1959. The landings which, in the Dutch auction, fall below certain minimum levels are withdrawn from the market and are in principle utilised for other purposes than for consumption. The shipowner receives the minimum price; the difference between the minimum price and the repurchase price is covered by Government allowances and shipowners' contributions.

Although the prices for fishing products have improved over the past few years, the yield of Belgian fisheries is on the whole still considered to be insufficient.

The Belgian Market for Fishery Products.

The *share* of the Belgian supply in the overall *domestic consumption* of fishery products amounts to approx. 50%. In addition, imports are increasing considerably from one year to another whereas the production is stagnating. The position of the national landings in respect of supply of fresh fish is however more favourable. The fisheries supply about 86% of the domestic consumption of round fish, whereas the landings of flat fish are sufficient to cover domestic requirements to a major extent and even to export.

TABLE III

COMPARATIVE TABLE OF LANDINGS, IMPORTS AND EXPORTS OF FISHERY PRODUCTS IN 1963

Categories	Quantity (in '000 tons)			Value (in million FB)		
	Landings	Imports	Exports	Landings	Imports	Exports
Fresh, chilled or frozen fish	49.8	27.6	12.9	609	418	282
Salted, dried or smoked fish	—	12.4	3.1	—	156	69
Crustaceans and molluscs	1.9	24.7	0.2	47	328	12
Preserves of fish, crustaceans and molluscs	—	20.6	0.4	—	696	17
Total	51.7	85.3	16.6	656	1,598	380

(Source : National Statistics Institute)

Prospects.

Everything points to the assumption that the Belgian sea fishery will in the medium term tend towards rational operation of ultra-modern midwater ships. The form of operation will probably be overwhelmingly of the handicraft type.

Further it may be agreed that the Belgian fishery will in future continue to be based mainly on the domestic demand for fresh high grade fish. It will however more and more face competition from foreign countries, according as modern forms of distribution such as prepacking, frozen fish, fish fingers, etc., make headway in our country.

The *development of the EEC* constitutes a positive factor for our fisheries. Before the establishment of the EEC practically no customs duties were charged in Belgium in respect of fresh sea fish whereas the abolition of the tariffs among the member countries has moreover improved our export position on the French market and the establishment of the future external tariff will better protect the national market against the import of cheap fresh fish from the Scandinavian countries.

The Belgian fishers will by the terms of the Treaty of Rome be in a position to fish within the Dutch and German fishing limits by December 31, 1967 at the latest. Interesting fishing grounds will thus become available.

The common fishing policy which will be worked out before the end of 1965 will effect within the Common Market a levelling-out of competitive conditions mainly by equalising the granting of aid, the minimum rates, social charges etc. This common policy is bound to lead to a market for fishery products whereby the producers will be ensured a decent standard of living and the consumers a sufficient supply at reasonable prices.

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